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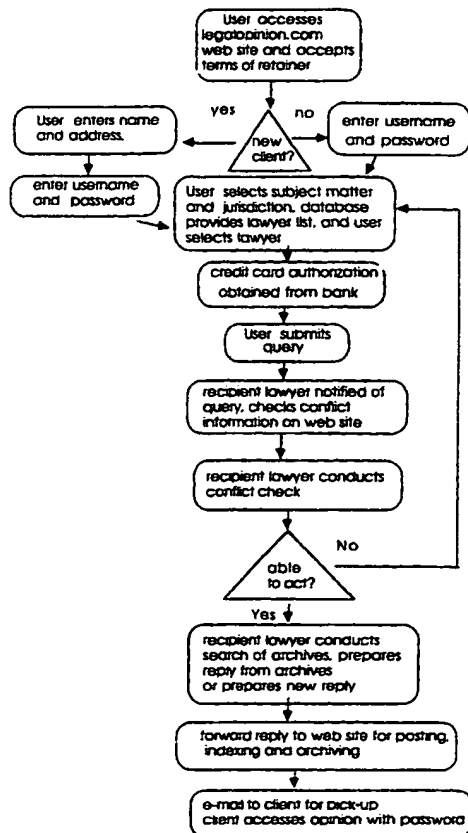
(57) Abstract: According to traditional delivery of legal services, a client with a legal problem in need of a lawyer personally contacts a lawyer after obtaining a referral from an acquaintance, yellow pages ad or the like. In many cases the traditional model for delivery of legal services is inappropriate if the client wants a simple, inexpensive assessment of the client's legal rights or liabilities. The present invention provides a method for providing legal services over the Internet while maintaining solicitor/client privilege, by providing a website linked to legal specialists by legal expertise and jurisdiction, who receive and reply to client e-mails after the client pays a fee by e-commerce through the web site.

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METHOD AND SYSTEM FOR
INTERNET DELIVERY OF LEGAL SERVICES

Technical Field

5   The invention relates to systems for computerized delivery of legal advice, and more particularly to use of the Internet for delivery of legal services.

Background Art

10   According to traditional delivery of legal services, a client with a legal problem in need of a lawyer contacts a lawyer after obtaining a referral from an acquaintance, seeing a yellow pages advertisement, obtaining the lawyer's name from a referral service or the like. The client makes an appointment with the lawyer and visits the lawyer's office 15   at the appointed time. After the client personally describes the legal problem to the lawyer, the lawyer either will refer the client to a specialist in the pertinent field, or to a lawyer in another jurisdiction if that is appropriate, or takes on the work himself, in which case a retainer agreement is reached with the client, a sum of money is paid as a 20   retainer, and the lawyer commences work on the problem and ultimately renders an opinion.

In many cases the traditional model for delivery of legal services is inappropriate. For example, the client may want a simple, inexpensive assessment of the client's legal rights or liabilities before 25   committing any significant time or money to retaining a lawyer. Similarly, from the lawyer's standpoint often it is necessary to devote a significant amount of unbillable time to listening to a client's problem and interpreting a fact situation which ultimately requires referral to another lawyer or jurisdiction, or the cost of providing the service causes the

client not to retain the lawyer's services. At the same time it is important for a client to be protected by solicitor/client privilege in respect of any communications to a lawyer. There is therefore a need for a quick, inexpensive system for delivering legal services on-line over the Internet

5   while retaining solicitor/client privilege.

Disclosure of Invention

The present invention provides a method of delivering legal services over a computer network comprising: a) providing a web site

10   accessible to users on the network via a plurality of client terminals and comprising a server, the server being adapted to i) receive and forward e-mail messages; ii) store a database of e-mail addresses for recipient lawyers, indexed by jurisdiction, practice area and geographical address; and iii) conduct e-commerce transactions to obtain payments from the

15   user and lawyers; b) obtaining on-line payment of funds from the user; c) providing means for the user to identify the client's name and address and select a practice area and jurisdiction and forward a query requiring legal advice relating to the practice area; d) searching the lawyer database for one or more appropriate lawyers and displaying the results of such

20   search to the user for selection; e) the user selecting a lawyer from the displayed search results; f) forwarding by e-mail to the e-mail address associated in the database with the selected lawyer notification that a query has been received, and making available for viewing by said lawyer at said web site information concerning the client for purposes of

25   checking for conflicts of interest, and the query; g) the lawyer checking for a conflict of interest and electing to accept or reject the query; h) the lawyer posting to the web site a password-protected reply to the query;

and i) e-mailing the user that a reply has been posted on the web site accessible to the user's password.

Brief Description of Drawings

5   In drawings which disclose a preferred embodiment of the invention,

Fig. 1 is a block diagram illustrating a computer network for carrying out the invention;

Fig. 2 is a flowchart illustrating the method of the invention.

10

Best Mode(s) For Carrying Out the Invention

With reference to Figure 1, a number of potential users/clients have access to the Internet network 10 via remote client terminals 12 using available Internet browser software. A web site 14,

15   for example legalopinion.com, consisting of a web server 16, comprising web server 18 accessible to the Internet and secure server 20 for storing client account information, historical data etc. and which is protected from the Internet access by firewall 22 but can communicate with server 18. Web site 14 also stores a database of the e-mail addresses of lawyers

20   registered with the system in the various state and provincial jurisdictions in Canada and the United States indexed by their jurisdiction, practice area and geographical location (city or town). Also stored on web server 16 is a database of previous questions and opinions generated in response to client requests, indexed by key words, subject matter, jurisdiction and

25   the name of the lawyer/law firm which generated the opinion.

The legalopinion.com server 16 supports the web site accessible to clients over the Internet, and conducts the e-commerce

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transactions whereby users pay for the service. Firewall 22 reduces the possibility that hackers can access or alter account information.

a)   Law firm Registration

5   In setting up a law firm account with legalopinion.com, or an individual account for sole practitioners, basic contact information for each participating office is entered through the legalopinion.com web site on a first screen along with the firm profile. The law firm/administrator will then be required to login to their user account and for each office,

10   to identify the jurisdiction and select the practice areas that they would like to be listed in. Firms may only list in jurisdictions where they maintain an office for the practice of law.

For each office, the following sequence of screens will be presented:

15   1.   A page where the email addresses of the lawyers will be entered. Each practice area selected for each office location must have an email address assigned to it. Duplicates are allowed across practice areas but no one lawyer may occupy more than one spot within a practice area. If a firm wants more than one listing

20   under one practice area, they can assign several lawyers to the same practice area.

2.   A final confirmation screen will be presented so the law firm can confirm that all data has been entered correctly. The total membership cost (listed by office) will also be reflected here.

25   They must also review the Participation Agreement and choose "Agree", at which time the system will send the application to legalopinion.com for verification.

3.   legalopinion.com will receive notice in email that a new law firm has applied. A legalopinion.com staff member will use the Administration section to view the applicant's information to perform verification. Once verified and made active, the new applicant will automatically receive an email with instructions for using the site, and the law firm will be indexed in the appropriate database by jurisdiction and practice area.

b)   User/Lawyer Login/Logout

A user at terminal 12 accesses the legalopinion.com web site 14 by pointing his or her browser at the web site URL. The user will be presented with a graphic interactive interface. Users are first prompted to login. Those users who do not have a username and password are required to enter on a single registration page basic contact information, as well as pick a username and password, and provide credit card information for billing purposes. For example, usernames will be no longer than 8 characters in length, and passwords will be at least 6 characters in length, but no longer than 10 characters long. The user enters the password a second time to confirm. Should any of the required fields not be filled in, or if a field restriction is not met (i.e. password not long enough) then the form will be redisplayed with an error message(s), and the user must correct the errors to continue. The user may then start using the site immediately after registration.

Prior to accessing many of the web site 14 areas a user or lawyer must log in with their username and password. If someone attempts to access an area of the site that requires one to be logged in, that user/lawyer will be taken to the login page. Upon successful login

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he or she will be immediately taken back to the area they attempted to enter. A user or lawyer may logout at any time by choosing the appropriate link in the navigation bar. If a user/lawyer does not click on a page for 20 minutes (this number is configurable) then his/her login

5   session will expire and the next attempt to load a page will take them to the login screen and indicate that he/she has been timed out. The user/lawyer will have to log in again if he/she wishes to continue.

c)   Query entry

10   The essential feature of this system is the submission of a legal question by a user, and the answering of the question by an appropriate lawyer. Upon having successfully logged in, the user is presented with an opportunity to read the legalopinion.com disclaimer. For example, the web site displays an introductory page explaining the

15   nature and costs of the service, accompanied by the appropriate legal disclaimers. Upon clicking a button to confirm acceptance of the terms under which the service is being provided, the user next chooses the jurisdiction to which the question applies (i.e. the relevant state of the United States, Canadian province, or the federal jurisdictions of the

20   United States or Canada). The user then chooses the practice area to which the question applies, and clicks on a "Submit" button. For example, the user may be presented with a scroll-down menu for selecting the general category of the user's legal problem showing general categories such as the following:

25   **Accident Law**

Administrative Law

Bankruptcy Law

Business Law

Civil Liberties

Criminal Law

Employment Law

5   Entertainment Law

Environment Law

Estate Planning

Family Law

Financial Law

10   General Practice

Government Law

Immigration

Insurance Law

Intellectual Property

15   International Law

Litigation

Personal Injury

Real Estate Law

Small Claims

20   Tax Law

The legalopinion.com web site then runs a Lawyer Search Engine (described in further detail below) on its lawyer database to locate the list of lawyers matching the selected jurisdiction and practice area, 25   and also matching the user's city, where the user's city is within the selected jurisdiction. The web site displays to the user the list of lawyers

generated by the search and the user is invited to select a lawyer from the list. If no lawyer matches the search terms, the user is invited to:

a)   select a lawyer outside their city but within the selected jurisdiction;

5   b)   return and modify their input (perhaps trying a slightly different practice area that may also apply); or

c)   ask to be notified via email when a lawyer that matches the search is added to the system.

Upon selecting a lawyer the user will be taken to the
10   questionnaire screen for the practice area. Each practice area will have its own questionnaire page due to the many different types of information that may be needed. For some cases, a user may be prompted to choose a specific category within a practice area before proceeding to the questionnaire page. In addition to other background facts, the user
15   provides the names of any adverse parties for purposes of a conflict check. Upon filling out all of the fields and clicking "Submit", the user will be presented with a confirmation page that shows what he/she entered. If not all fields were filled in the user will be warned that the opinion they receive will be only as good as the quality of information
20   that is submitted to the lawyer. The user will have the option to go back and re-enter or add data, or he/she may click "Submit" to continue.

The last steps are to enter their credit card or billing instructions and review the terms of the User agreement. If satisfactory the user clicks "Agree" and the question is sent to the lawyer for
25   acceptance. The user may decide to abort the question process if he/she disagrees with the terms of the user agreement.

d) Accepting a query

A lawyer will be notified by e-mail when a question for that lawyer has been received by the system. A link within the e-mail will take the lawyer to the login screen at legalopinion.com, after which the lawyer will be taken directly to the lawyer's "incoming" folder. Here the lawyer can click on the awaiting client information. After viewing the client information the lawyer will decide whether to accept the client. Delivery of the client information and the client question is a two-part process. The client information is delivered to the lawyer (the incoming folder) and accepted or rejected first before reviewing the question so the lawyer can conduct a conflict check in respect of adverse parties against his or her own client index, in case there is a conflict of interest. If the client is accepted then the question then appears in the lawyer's incoming folder. After reviewing the question the lawyer still has an opportunity to accept or refuse the question. If accepted, the user's credit card is billed. If the credit card is not accepted then the question is removed from the lawyer's incoming folder. The user is notified of the declined card and is provided a link to take the user to a page where he can enter different billing information. If the question is resubmitted then it is routed to the same lawyer to await re-acceptance.

If a lawyer does not accept a client/question within 1 business day (and did not explicitly refuse it) a reminder email will be sent to the lawyer. If a lawyer does not accept a client/question within 2 business days (and did not explicitly refuse the question) it will be removed from the lawyer's incoming folder. The user will be notified via e-mail that the lawyer has not accepted the question. That e-mail will

contain a link to take the user back to the list of lawyers suitable for the question. He can then decide whether to choose a different lawyer or simply discard the question entirely. The lawyer who did not respond to the incoming question will get an e-mail warning him/her of the lawyer's responsibilities as a member of legalopinion.com. A flag will be placed against their account to track the number of missed questions.

Once a question has been accepted it is moved to the lawyer's pending folder, waiting to be answered.

e) Answering a Query

A question can be answered by clicking on it in the lawyer's pending folder. The subsequent screen will show the prompts and the answers the user supplied. The lawyer enters his/her opinion in a single, large text area. Upon completion the lawyer can click on "Submit" to preview the answer. If the answer is acceptable, then clicking "Submit" again will complete the process and submit the answer by e-mail to the legalopinion.com web site. The original question and reply are indexed and stored, password-protected, in the web site archive indexed under that lawyer/lawfirm's name, practice area, jurisdiction, and the textual content of the question and answer (key words).

Upon submission of the answer, the user is notified via email that his/her question has been answered. In the email received by the user indicating the question has been answered there will be provided a link that takes the user straight to the answer (after logging in), now located in the user's "answered" folder.

The answer page shows the entire transaction:

-- Prompts and the user's answers to them

-- The lawyer's opinion

-- Dates for initial submission, lawyer response, and billing

-- A link to the law firm profile page within legalopinion.com

5   Also on this page is a web form that allows the user to send feedback to the lawyer. Presumably after this feedback is sent the lawyer and user will begin communicating directly via email. The web form is simply a convenience offered to the user and lawyer to help facilitate the ongoing relationship.

10

f) Account Management

So that both users and lawyers are able to manage their accounts. The following features can be selected:

Edit your profile: contact information

15   View your question/answer folders

For users: pending, answered

For lawyers: incoming, pending, answered

View contents of a question/answer

For users: ask a question

20   For lawyers: accept a question, answer a question

Law firms also are provided special administrative accounts that manage the jurisdictions, practice areas, and email addresses of lawyers within the firm that will handle each practice area. This administrative account will also be e-mailed when one of the firm's lawyers

25   receives a question. It will also be e-mailed when a lawyer fails to accept or refuse a question within the 2-business-day period. This administrative account may also flag a lawyer as "inactive" so that new

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questions are not routed to the lawyer. Inactive lawyers will also not appear in search results. This may be done periodically as specific lawyers are too busy, or are out-of-town or otherwise not able to respond within the 48 hour period. If a lawyer with pending questions is flagged

5   "inactive" the administrator will be notified that those questions will be re-routed through legalopinion.com if not answered within the 2-business-day limit.

g) Security

10   All screens containing sensitive data are transmitted securely over the Internet using 40-bit SSL. Question and Answer information stored in the database is encrypted using Blowfish (an encryption algorithm). Only the user and law firm involved in a question/answer will be able to view the information. This prevents legalopinion.com

15   database administrators from viewing sensitive information while performing maintenance on the system.

h) Lawyer Search Engine

The Lawyer Search Engine will be used both for the "Asking

20   a Question" process as well as a separate page for looking up lawyers in the system.

Like most search engines, legalopinion.com provides a "simple" search and an "advanced" search. The simple search will have just one field where a user can type any keywords. If more than one

25   word is entered the search engine will use an "AND" relationship, meaning that the more words entered the more focused the results. The

search engine will look for those words in the name, jurisdiction, law firm, and practice area fields in the database.

The advanced search will offer separate entry fields for each of the database fields being searched. This will allow users who know certain fields to receive a much more targeted set of results.

The results will come back to the user 3 lawyers at-a-time (this number will be configurable). The order in which the lawyers are listed will rotate. For example, if during one search Lawyer "Joe" is listed first and lawyer "Sarah" is listed second then on the next search Sarah will be first while Joe will have been sent to the bottom of the list.

The search results will show the lawyer name, law firm, address, and phone/fax, and size of firm. Clicking on the name will take the lawyer to a detailed page about the law firm, including contact information, a link to the law firm's corporate homepage, and their firm profile (limited to approximately 500 words) and list of other office locations. A link from this screen should take the user back to the search results from which he/she just departed. The search results screen preferably also redisplays the search fields with the data the user entered filled in to allow for quick modifications to the original query for resubmission.

i) Private/Public Library

Lawyers within the same law firm will have the ability to search and view past questions and answers that their firm handled through legalopinion.com. Data from other law firms will be kept secure by reason of solicitor/client privilege. Lawyers will be able to perform

a simple search or an advanced search, just like the Lawyer Search Engine. The fields that will be searched upon in a simple search will include lawyer name, law firm, practice area, jurisdiction, and the textual content of the question and answer (key words). The advanced search

5   will allow these fields to be filled in individually.

The search results from the library will be presented 10 items at a time. Forward/Previous links will be available. The search results screen should also redisplay the search fields with the data the lawyer entered filled in. This will allow for quick modifications to the original

10   query for resubmission.

Clicking on a result will display the full text of the question/answer. There should be a link on this screen that lets the lawyer "use this answer" as the basis for answering a pending query. Choosing that link will bring the lawyer to the list of pending questions where

15   he/she can choose the appropriate question. The answer process will continue as if he/she had just entered the answer him/herself.

After submitting an answer to a user's question the lawyer will be prompted to contribute the question/answer to the public library. The public library is accessible by all lawyers (and only lawyers) in

20   legalopinion.com. The submitter will be instructed to remove all names, contact information, and other confidential data from the material prior to submitting it. Searching the public library and using the results will occur just as with the private library.

25   j) Message Boards

The message boards are threaded discussion areas where users can follow (and respond to) a thread of discussion that is stored in

a database (unlike real-time chat which is not stored and is unorganized). The basic functions that are needed include:

       Create a new thread of conversation (a new top-level topic)

5   View a thread

       View a message (with the ability to move to the next or previous message)

       Reply to a message (with preview before posting)

       Write a new message (with preview before posting)

10

       Message boards often use aliases or nicknames for anonymity when posting messages. Due to the sensitive nature of the site, legalopinion.com preferably follows that methodology, using users' legalopinion.com usernames for their message board aliases. Therefore

15 a user must be logged in to post a message. Guests may browse the message board but will be unable to write a message. If a user attempts to write a message without being logged in then he/she will be taken to the login screen.

When replying to a message, the original message should be "quoted"

20 using the " > " character to prefix each line.

k) Real-Time Chat

       The invention's web site also preferably provides a chat room, through a licensed real-time IRC chat client (a Java applet). The

25 chat room is used for special events as well as generic chat between users (and lawyers) of the site which is always open to both users and lawyers. As with the message boards, the lawyers will also have a private chat

room for themselves. The Java applet is available as both an in-page applet or out-of-page (a pop-up window) applet, either of which may be used with the invention.

To use the chat room, a user or lawyer must be logged in. This will prevent wayward surfers from interfering with what is hopefully a meaningful conversation. The user's legalopinion.com username (which they chose upon registration) is the user's nickname in the chat room. If a user attempts to join a chat room without being logged in then he/she will be taken to the login screen.

l) E-commerce

A transaction processing company is preferably utilized to handle online payments. There are three operations that require online payment:

a) When a user submits a legal question;

b) When a law firm/lawyer signs up to the site (e.g. a fee per practice area);

c) Billing for law firms/lawyer when their annual membership fee is due.

One month prior to annual membership fee being due an automatic email will be sent to the law firm administrator with a link to the renewal page which will advise of membership dues, due date and payment instructions. This automatic email will again be sent out one week prior to renewal date if the firm has not yet renewed, this time advising that not renewing in time may cause their firm's account to be marked inactive. Two weeks after a renewal date being missed, another email warning will be sent advising them that in two weeks their account

will be marked inactive. One month following renewal date, the firm will be advised that their account has been marked inactive, that they will no longer appear in the directories and that any questions not answered within the next two business days will be re-routed to other lawyers in the system.

m) Miscellaneous

Law Firm Administration

This area will list the participating law firms. A firm may have three statuses: pending (they have just submitted an application), active, or inactive. After verifying a new applicant a legalopinion.com staff member would change the status from pending to active, causing the law firm credit card to be billed automatically (if that payment method was chosen). legalopinion.com may choose to make a firm "inactive" for reasons such as non-payment, poor performance, etc. While inactive the law firm and its lawyers will not be available via the website.

User Administration

The user administration area is probably most useful for reporting purposes. Here legalopinion.com can determine the number of users signed up, amount billed per user, etc. Users will also have an active/inactive flag. legalopinion.com could make a user inactive for poor behaviour in the chat and/or message boards, or for fraudulent payment attempts, and so on.

By way of example, the client's legal problem is a car accident which occurred in Seattle, Washington, so the client has selected

the category "ACCIDENT LAW" and has selected the jurisdiction of the opinion to be the client's residential address, Seattle, Washington. The client's fact description which is entered is as follows:

> --My car was hit by another vehicle driven by Joe Smith at an
> 5   uncontrolled intersection. The other vehicle was approaching on my right. I entered the intersection first but I didn't see the other car coming and it hit my car. Who is at fault?"--

The Lawyer Search Engine conducts a search under ACCIDENT LAW and the geographical address Seattle, Washington and

10 displays to the client three lawyer names. The client selects Lawyer A, and an e-mail is sent to Lawyer A's e-mail address. Lawyer A then reviews his/her incoming folder and checks for a conflict with Joe Smith, and confirms that there is no conflict in acting on the matter. He/she then reviews and accepts the client query. He or she may then search

15 previous questions received by and opinions generated by that lawyer/law firm on the web site database under the words "uncontrolled intersection" as key words, for example, and under the category ACCIDENT LAW. He or she may locate prior opinion letters in the private and/or public library indexed under those keywords and may use such prior opinions

20 as the basis for a reply. If none of the previous opinions is appropriate or accurate, the lawyer prepares a new reply. The lawyer then replies through an on-line form at the legalopinion.com website with the appropriate reply. The reply is then posted to the legalopinion.com web site under the client password, and legalopinion.com automatically sends

25 an e-mail to the client inviting the client to visit the web site to receive the opinion. The client then points his/her browser to the web site and after entering his/her password is linked to the opinion letter posted to the

user's "answered" folder. A copy of the original query and opinion are indexed under the subject matter ACCIDENT LAW and jurisdiction of Washington and stored in the web site archive under that lawyer/law firm name, and possibly also the public library where confidential data has

5   been removed as noted above.

        In this way the client receives a fast piece of advice from an appropriate lawyer in the appropriate jurisdiction, while maintaining solicitor/client privilege. By demonstrating knowledge in answering the client question, laying out options for the case, and possibly estimating

10   costs for taking the case forward, the attorney is well positioned to service the client if the client proceeds with the case.

        While the invention has been described using the Internet, the invention could also function on other global networks. While the invention has been described as web-based, it can be developed as a

15   Windows™, Macintosh™, Unix™, or Java™ based application to operate on clients other than a web browser. As will be apparent to those skilled in the art in the light of the foregoing disclosure, many alterations and modifications are possible in the practice of this invention without departing from the spirit or scope thereof. Accordingly, the scope of the

20   invention is to be construed in accordance with the substance defined by the following claims.

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WHAT IS CLAIMED IS:

1.   A method of delivering legal services over a computer network comprising:

a)   providing a web site accessible to users on the network via a plurality of client terminals and comprising a server, said server being adapted to i) receive and forward e-mail messages; ii) store a database of e-mail addresses for recipient lawyers, indexed by jurisdiction, practice area and geographical address; iii) maintain user accounts; and iv) conduct e-commerce transactions to obtain payments from said user and lawyers;

b)   obtaining on-line payment of funds from said user;

c)   providing means for said user to identify the client's name and address and select a practice area and jurisdiction, if different from the client's geographical location, and forward a query requiring legal advice relating to said practice area;

d)   searching said lawyer database for one or more appropriate lawyers and displaying the results of such search to said user for selection;

e)   said user selecting a lawyer from said displayed search results;

f)   forwarding by e-mail to the e-mail address associated in the database with the selected lawyer notification that a query has been received, and making available for viewing by said lawyer at said web site information concerning the client for purposes of checking for conflicts of interest, and the query;
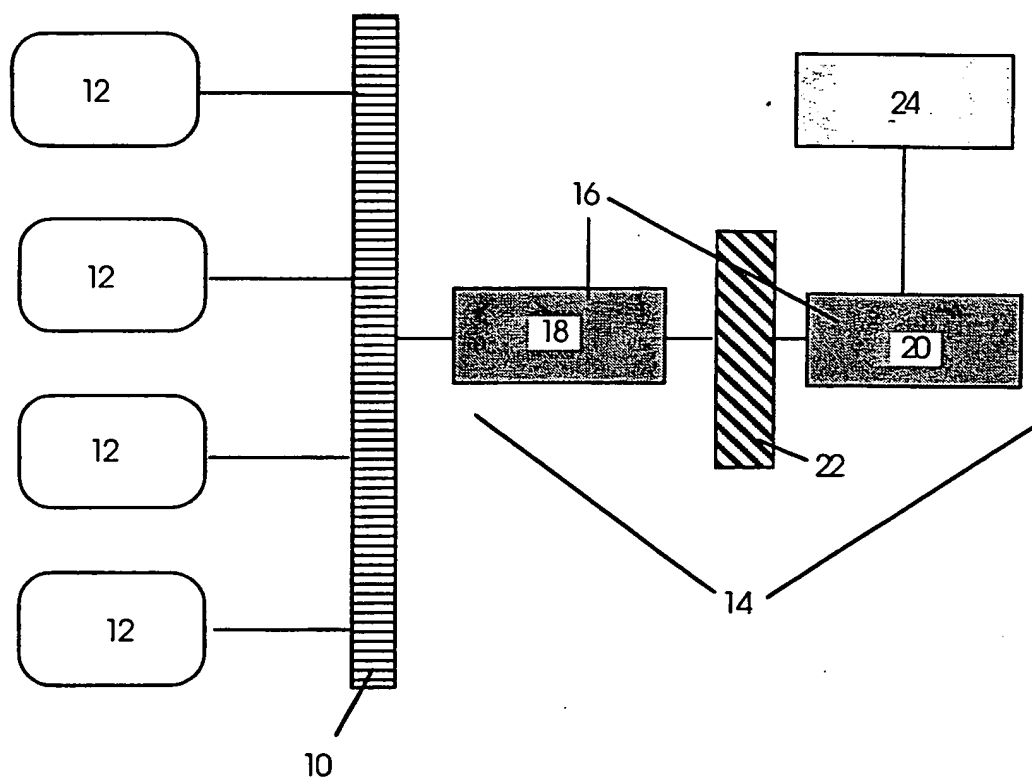
g)   said lawyer checking for a conflict of interest and electing to accept or reject said query;

h)   said lawyer posting to the web site a password-protected reply to the query; and

5   i)   e-mailing the user that a reply has been posted on the web site accessible to the user's password.

2.   The method of claim 1 wherein said client is advised that said lawyer has not accepted said query if said query is not accepted by
10   said lawyer within a maximum period of time.

3.   The method of claim 1 wherein said server is further adapted to v) store an archive of indexed messages of legal advice, associated with an index of key words; comprising the further steps of
15   indexing and storing said e-mail query and reply; and searching said archive for relevant archived replies in accordance with solicitor/client privilege prior to replying to an e-mail query.

4.   The method of claim 1 wherein said server is further adapted to v)
20   store an archive of indexed messages of legal advice, associated with an index of key words; comprising the further steps of indexing and storing said e-mail query and reply after removing any confidential information, and searching said archive for relevant archived replies prior to replying to an e-mail query.

25

5.   The method of claim 1 wherein, if no participating lawyers are located in the client's chosen jurisdiction, practice area and

geographical location, said client is given further options to select a lawyer in another practice area or geographical location.
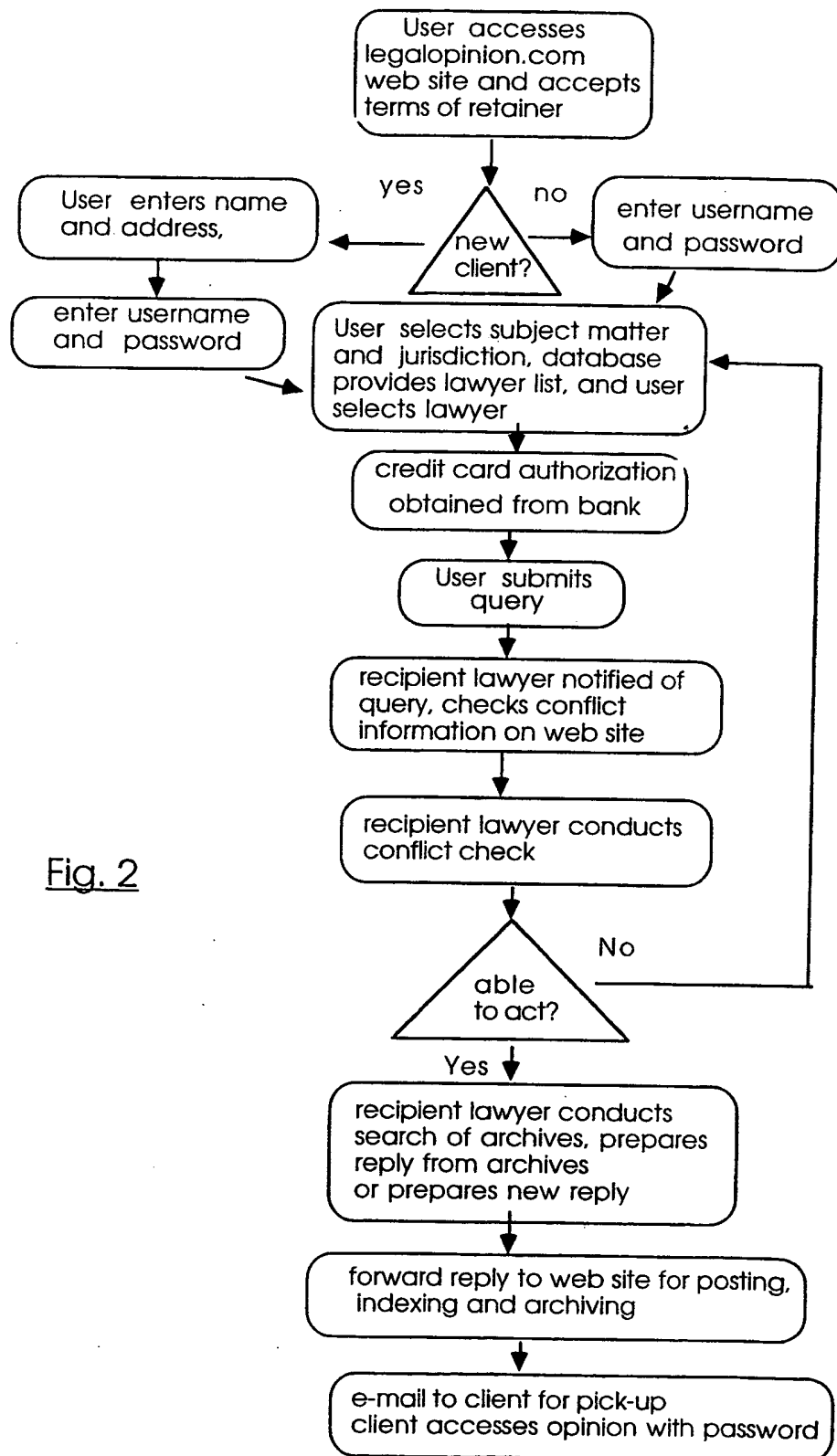
1/2

FIG. 1

User accesses
legalopinion.com
web site and accepts
terms of retainer

yes   no

User enters name
and address,

new
client?

enter username
and password

enter username
and password

User selects subject matter
and jurisdiction, database
provides lawyer list, and user
selects lawyer

credit card authorization
obtained from bank

User submits
query

recipient lawyer notified of
query, checks conflict
information on web site

recipient lawyer conducts
conflict check

Fig. 2

able
to act?

No

Yes

recipient lawyer conducts
search of archives, prepares
reply from archives
or prepares new reply

forward reply to web site for posting,
indexing and archiving

e-mail to client for pick-up
client accesses opinion with password